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Key Performance Indicators Reporting System(KPIRS)User Guide

Alberta Enterprise and Advanced Education

Post Secondary Planning & Investment Branch

This document is to be used in conjunction with the Key Performance Indicators Reporting System (KPIRS) manual and the Post Secondary Information Reporting manual. The Key Performance Indicators Reporting System collects data on performance indicators such as operations costs per FLE, graduate student satisfaction, and university transfer program leavers.

This user guide is intended to give institutions an understanding of how to use the Key Performance Indicator (KPI) system to access different indicators, how to print and preview indicator reports, how to view information in different ways and how to *export* KPI data to the Department.

The KPIRS system can be installed on a stand-alone PC or it can be installed on a Local Area Network (LAN). Institutions may have already installed the Launch facility. Refer to the Appendix for instructions on downloading the KPIRS software, version 2011-12a from the File Transfer Protocol (*FTP)* site and how to install the software.

For a description of the data elements that make up the various components of KPIRS, refer to the Key Performance Indicators Reporting Manual. For descriptive information of all systems, refer to the Post Secondary Information Reporting manual.

The current version of this document and the other manuals mentioned are available on the Alberta Enterprise and Advanced Education website http://www.eae.alberta.ca/post-secondary/funding/supportsinstitutions/resources/data.aspx and on the Campus Alberta Planning System (CAPS) website (https://portal.aet.gov.ab.ca/apps/caps).

The manual will be updated as necessary and institutions' KPIRS contacts will be advised when a new version has been posted to the site.

If you are a new user to CAPS, a new account can be created through SIAMS by clicking the 'Are you a new user?' link.

Alternatively, specific instructions on downloading the manual, including the location of the department's FTP site, are provided to each institution's KPIRS contact.

For questions on how to use the KPIRS software, contact the Information and Application Services Branch.

Contact:	Gordon de Rouyan
Email:	Gordon.deRouyan@gov.ab.ca
Phone:	(780) 945-0712

KPIRS User Guide
Prepared for
Comprehensive Academic & Research Institutions
Specialized Arts & Culture Institutions
Baccalaureate and Applied Studies Institutions
Polytechnical Institutions
Comprehensive Community Institutions
Independent Academic Institutions
and
Alberta Enterprise and Advanced Education
Post-secondary and Community Education Division

Contents

1. Overview of the Organization of KPIRS Software

This is an overview of the procedures available as part of the Key Performance Indicator Reporting System (KPIRS) software. KPIRS is accessible through the Launch bar, which is the common entry point for LERS, FIRS and KPIRS systems. Below are the KPIRS menu items that are available in the KPIRS Software and the functions available under each. Certain main menu headings or drop-down options are only available to institutions that require them.

Note: *Most of the menu items have one letter underlined. Typing this letter is a quick way to open the screen for that item.*

KPIRS Menu Items

Key Performance Indicators Reporting System

File   Edit   Navigation   Reports   Utility   Window   Help

File

        Key Performance Indicators
        Non-credit Entry
        Print Setup…
        Exit

Navigation   (enabled when Key Performance Indicators or Non-credit Entry has been selected)

        First
        Prior
        Next
        Last
        Find
        New
        Delete

Edit   (accessible only after any screen is opened)
        Undo (Ctrl+Z)
        Redo (Ctrl+R)
        Cut (Ctrl+X)
        Copy (Ctrl+C)
        Paste (Ctrl+V)
        Select All (Ctrl+A)

Reports
        KPIRS Reports

Utility
> Data Submission Analysis
> FTP Browser
> Provider Export
> Provider Upload
> Get Update
> Refresh Code Tables

Window
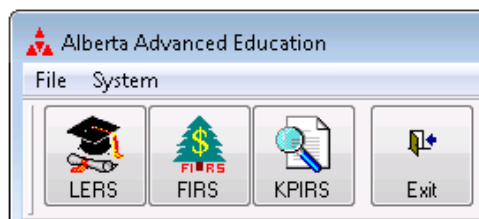> Shows all the windows currently opened

Help

> Contents
> Search for Help on…
> About KPIRS

2. Launching KPIRS

To launch KPIRS:

1. Click on the four red triangles Alberta Learning icon on your Windows desktop to execute the Launch program. The Alberta Advanced Education systems launch bar appears as shown below:

Figure 2 - 1: The Alberta Advanced Education Launch Bar

2. Click on the **KPIRS** (Key Performance Indicator Reporting System) icon on the Launch bar. The Logon dialog box appears as shown below:
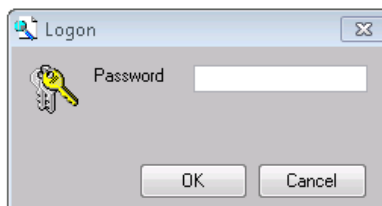
Figure 2 - 2: The Logon Screen

3. Enter the Password in the **Password** *field*. The password is available by contacting Gordon de Rouyan at Gordon.deRouyan@gov.ab.ca.

4. Click on the **OK** button. If your password is valid, you will be logged in to the KPIRS system and the menu bar appears.

3. Viewing the Key Performance Indicators Data

To open the Key Performance Indicators screen:

1. Go to the menu bar and choose **File** and click on **Key Performance Indicators**. Please wait until the dialog box appears. After a few seconds the Key Performance Indicators screen appears as shown below:

Figure 3 - 1: The Key Performance Indicators Screen

2. Select the **Academic Year** from the drop down list box.

   For most indicator sets this is the same as the most recent academic year of enrolment data in the Operations Costs per FLE indicator. For some indicators, such as Graduate Employment and Academic Outcomes, the data required are for a previous academic year or cohort. Refer to the KPIRS Reporting Manual to determine the correct reporting year for each indicator.

3. Select your **Institution's** name from the provider drop down list box and then select the **Indicator**. If there are data for the selected indicator set, the data will be displayed on the Key Performance Indicators screen.

   The Key Performance Indicators screen shows the total number of records for the selected indicator at the bottom of the screen. For indicators reported at the Institutional level, such as the Access - Non-credit Unduplicated Headcount, the Academic Year will be disabled, as all years of data will be presented on the screen.

   The lists of indicators appear in the same order as the indicator sets appear in the KPIRS Reporting Manual. There are different types of indicators and each indicator has its own reporting level and reporting year. For a detailed description of each indicator and when to report each indicator please refer to KPIRS Reporting Manual.

Note: *You can view the different indicator data in Table, Form or Note view by selecting one of the options from the View drop down list box located in the top right corner of the Key Performance Indicators screen.*

4. Viewing Indicators Data in Different Views

Table View

By default, the data are presented in a Table view - where the rows define the scope and level of reporting and the columns represent the data elements for each indicator.

Please refer to the KPIRS Reporting Manual for the level (usually "program/specialization" or "institution" level) and the scope of reporting (which programs) applicable to each indicator.

Figure 4 - 1: The Key Performance Indicator Screen - Table View

The Key Performance Indicator Screen can be re-sized, and the columns may be hidden, moved, or adjusted for width. Scroll bars allow users to access columns and rows that are not visible within the screen. In the Table view the various data elements for the indicator are presented as columns and identified by the column header. In order to see the full name of a data element in the column header, the column can be expanded. When entering data, you may find it useful to move or re-size the columns as desired. Column sizes are restored when you re-enter the indicator.

By default the Table view presents the rows in alphabetical order by Program Name. Clicking on any of the column headers allows you to change the order. The column header indicates the order in which the rows are presented, which will show an arrow indicating the direction of the order, when that column has been selected.

The rows represent the records that contain data for the indicator. Each row consists of cells that contain values for:

- The data elements that uniquely identify the record (usually program identifiers, sometimes academic years, sending institutions, etc.),

- Data elements that reside within the department's KPIRS database (such as survey questions, operating periods, etc.),

- Data elements that have been extracted from other departmental databases (enrolment information from LERS, uses ASI information to obtain the information for the UT Transfer Leavers template, and financial information from FIRS),

- Elements where institution enters the data, and

- Calculated values (calculated by the software, often upon entry of other elements).

Cells that need to be entered by the user appear white. All others will be colored or shaded. Horizontal navigation through the cells on the table is best accomplished by using the mouse.

Use the Up/Down Arrows on the keyboard or use the navigation icons on the tool bar to move between records.

Warning: *KPIRS saves changes without a warning. Saving in this manner makes data entry quicker. If you accidentally change a cell, as soon as you tab out or put the insertion point in a different cell, the data will be saved right away. Use caution not to delete or change the data that you did not intend to delete or change. To ensure there is a copy of the entered values, print a report to refer back to if you accidentally make changes.*

Form View

To view data in Form view:

Select the **Form** option from the view drop down list box. A form with the selected indicator name appears as shown below:

Figure 4 - 2: The Key Performance Indicators Screen - Form View

The Form view allows you to view individual records.

This view first presents the record that the cursor was on when Form view was selected (by default, the first record) and allows you to scroll through the records using the navigation icons on the tool bar. Each data element of the record is depicted as a field within the form.

As in the Table view, some *fields* contain values, which may not be overwritten (these will be grayed out), others are for data entry and appear white. The form view provides labels for the data elements that are consistent with the definitions in the KPI Reporting Manual and the Post Secondary Information Reporting manual. Users often find the Form view easier to "visualize" and understand the indicators.

In Form view, the tool tip displays the long descriptions of the codes that uniquely identify each record as the cursor is moved over the field. The long descriptions are also available in the table view. In order to see them select the cell and keep the cursor still. In the case of the Program Name, the tool tip will display the Program ID.

| Code Field	Description Displayed by Tool Tip
Program Name	Program ID
Program ID	Program Name
Spec. Name	Specialization Code
Spec. Code	Specialization Name
AU	Administrative Unit
PT	Program Type
SA	Subject Area
SN	Standard Name
YR	Program Length in Years

The Program ID level is the standard reporting level for most of the indicators and for most of the institutions prior to 2004-05. Program ID and Specialization Code is the standardized level for all institutions thereafter. In some institutions and in some indicators prior to 2004-05, data had to be reported at a Standard Name level. In such cases, the Program Name will begin with the letters SN - indicating that the data are reported for each Standard Name (SN) code. (For example, SN: Adult Basic Education.)

The Program Length element (YR) was first introduced in 1996-97, and in most cases has been set to 0 for earlier years.

Notes View

To enter notes:

1. Go to the menu bar and choose **File** and click on **Key Performance Indicator**. The Key Performance Indicator screen appears.

2. Select **Notes** from the View drop down list box.

3. Enter the information in the white area. The information will be saved to the database upon exiting this view.
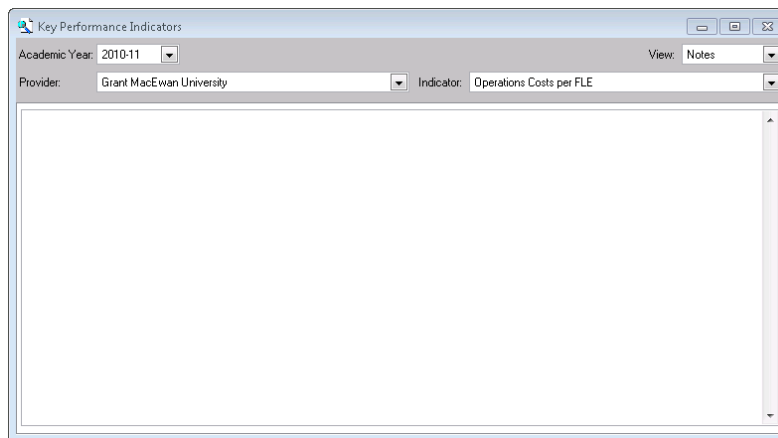
Figure 4 - 3: The Key Performance Indicator Screen - Notes View

This is used to give the department explanation on reconciliations and any anomalies that might appear in the data.

Reconciliation Indicator

To enter values in the Reconciliation Statement:

1. Go to the menu bar and choose **File** and click on **Key Performance Indicator**. The Key Performance Indicator screen appears.

2. Select **Reconciliation** from the Indicator drop down list box. The Reconciliation tab form appears as shown below. The Key Performance Indicator screen shows the total number of records in the Records Displayed area.

   The Total Operations Expenditures from the Expenditure indicator set is displayed. The Total Program Costs is also displayed, as is the Difference between these two values.

3. To enter a new line item, click on the **Add** button. A new row will appear on the grid with a description of **New Record**. The value entered in the Reconciliation column reduces the total operations expenditures to the amount allocated to programs.

Figure 4 - 4: The Key Performance Indicator Screen - Reconciliation Indicator

Note: *The line item is uniquely identified by the Description, therefore each line item must have a different description otherwise an error will occur when KPIRS attempts to save the line item.*

5. Entering Data and Editing Records

Each data element for an indicator is displayed as a column in the Table view, or as a field in the Form view.

The first set of program classification elements uniquely identifies the record based on the codes as displayed.

Many of the elements contain data that have been extracted from other Alberta Enterprise and Advanced Education databases - such as full and part-time headcounts, program completion data and FLE from LERS, revenue and expenditure data from FIRS, program classification structure from PRS and transfer data from ASI.

Note: *All of these values are not to be changed, except at the source, and cannot be edited from within the KPIRS application.*

Some elements are calculated values based on data in other elements.

The elements that require entry and/or editing by the institution are highlighted.

Move the cursor to the element for which you wish to enter data (click on the element, or scroll across or down the grid using the arrow keys, tab/shift tab key, and/or the navigation buttons). Tabbing into the cell will select the entire contents regardless if there are new data or old data. *Using the mouse will usually place the cursor into the center of the cell, which could have you entering in a smaller value than what was intended; a quick triple click with the mouse will select the entire cells contents.*

If entering new data, key in the appropriate values. If editing values, you may need to highlight the existing values before keying in the new information.

Any calculated elements on the record are refreshed and the new values displayed.

You do not need to save the record. The values entered will update your local database automatically once leaving the record.

6. Importing Financial Data from a Local FIRS Database

The Revenue & Expenditure indicators are populated with the most recent FIRS data available from the department's Oracle FIRS database. Values are extracted for the most recent Actual 2 Collection Year.

If your institution's FIRS data resides in the same location (directory) as the KPIRS data, you may update the values in the Revenue & Expenditure indicators with more recent information from your local FIRS database.
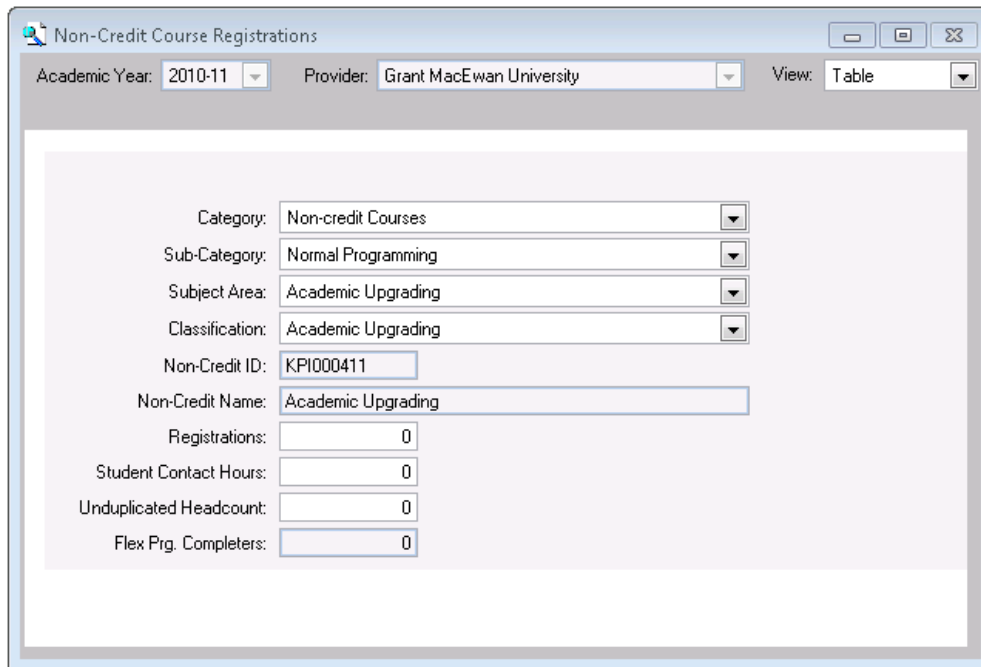
To Update the FIRS data in KPIRS:

1. Select **Revenue** or **Expenditure - related Indicators** from the Indicators drop down list box.

2. Click on the **Refresh values from FIRS** ⊡ icon at the bottom right hand side of the Key Performance Indicator screen to import the FIRS data into KPIRS and to refresh the screen. This step should be performed for both the **Revenue** and the **Expenditure** indicators.

Note: *This feature will cause any previously entered values to be replaced by the values that reside on your FIRS database. As well, when the data arrive at the department, any values that originated from your own FIRS database will be overwritten by Alberta Enterprise and Advanced Education values if they are not the same.*

7. Entering Non-Credit Course Registrations

To create a non-credit course registration record:

1. Go to the menu bar and choose **File** and click on **Non-Credit Course Registrations**. The Non-Credit Course Registrations screen appears. A table view (grid) is presented, with columns that describe the non-credit elements required. The rows are for the records that you will need to create.

2. Click on the **New** ⊡ icon on the tool bar. A form view is presented as shown below for each of the identifiers of the non-credit record.

Figure 7 - 1: The Non-Credit Course Registrations Screen - in Entry Mode

3. Select the **Category**, the **Sub-Category**, the **Subject Area** and the **Classification** from the drop down lists.

4. Enter the values in the **Registrations**, **Student Contact Hours** and **Unduplicated Headcount** fields.

5. When you are done, click on the **Save** icon 🖫 on the tool bar. The table view will be presented, with the new record included.

6. To change an existing record, highlight it in the table view, and click on the **Edit** icon 📝 on the toolbar.

To delete a non-credit record:

1. Go to the menu bar and choose **File** and click on **Non-Credit Course Registrations**. The Non-Credit Course Registrations screen appears.

2. Select the **Academic Year** from the drop down list box and put the *insertion point* on the row that you want to delete. If there is no non-credit data for the selected Academic Year, the Non-Credit Entry Screen will be blank.

3. Click on the **Delete** 📇 icon located on the tool bar. The record (row) data will be deleted from the Non-Credit Entry screen.

Note: *Course Registrations and Student Contact Hours are updated (saved) at the institution for the "Access: Non-Credit Unduplicated Headcount" indicator in the Key Performance Indicator form automatically. Unduplicated Headcounts cannot be summed up and placed into the indicator because students are unique at the program level and manually adding those up may result in an over-inflated number because of double counting.*

8. Generating Reports

Reports are available for all indicators and may be printed at any stage of the data entry process. All appropriate records will be displayed with or without values entered by the institution. All the data elements that you see on the screens are also presented on the reports, including calculated values. In addition, the reports provide summary totals, which cannot be viewed on the screen.

Hint: *It is often useful to generate the reports prior to entering data. These can be used as forms or templates for collection of the information from others at your institution.*

When all data have been entered and you are ready to submit the data, you are encouraged to print all reports and keep them where they can be referred to later.

To generate indicator reports:

1. Go to the menu bar and choose **Reports** and then click on **KPIRS Reports**. The KPIRS Reports screen is shown below:
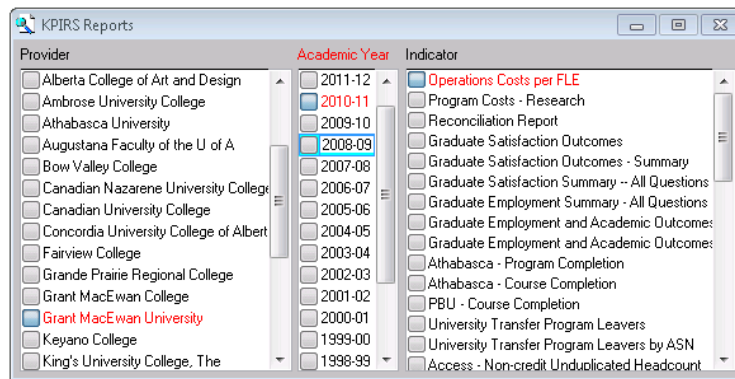
Figure 8 - 1: The KPI Reports Screen

2. Click on the button beside the Provider and then click on the button for the Academic Year. When the buttons are clicked, the selected item(s) will turn red and the button(s) beside the selected item(s) will be pressed down.

   Reports can be re-generated at any time and may be printed, viewed, or exported to a file. If there is no report for the selected indicators then the preview, print or the Export buttons do not bring up a report.

9. Exporting, Viewing or Printing Reports

There are three buttons located on the KPI Reports screen that will allow you to select and to deselect more than one indicators at once.

To Print a Report(s):

1. Click on the **Indicator** that you wish to print a report(s) for and click on the **Print** 🖨 icon.

To Preview Report(s):

1. Click on the **Indicator(s)** and click on the **Preview** 🔍 icon.

2. Once you are done previewing the report, click on the **Close Preview** 🔲 icon on the tool bar. You can also print the reports from this view.

You can use the navigation icons on the tool bar to go from one page to the next. You can also use the Go to Page icon on the tool bar to go to a specific page. Click on the **Go to Page** 🔲 icon. Type in the **Page Number** and then click on the **OK** button. This will take you to the page that you want to view. Click **Cancel** to exit.

To Export a Report(s):

The Export button is used to write the contents of the report to an Excel, Text or FoxPro file. To do this:

1. Click on the **Indicator(s)** and click on the **Export** button at the bottom of the KPI Reports screen. The Save As dialog box comes up.

2. Create a new folder or locate the directory where you want to save the file.

3. Select the file type from the **Save As Type** drop down list box and name the file.

4. Click on the **Save** button. An Export dialog box appears as shown below. Click **OK** for the message.
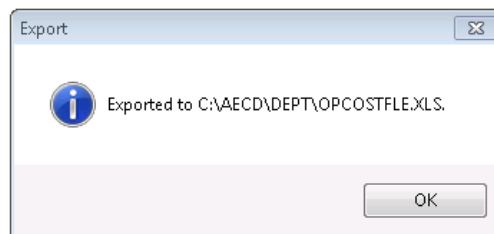
Note: *When exporting data, there are four types of file options available. Selecting either the **All Files** or **XLS** options will result in an Excel file being exported. The **File** option will result in a Text file being exported while the **Table/Dbf** option will result in a FoxPro file being exported.*

10. Getting KPIRS Data Updates

There are three approaches to getting KPIRS data updates from Alberta Enterprise and Advanced Education:

1. Legacy data update install retrieved from the FTP server.

2. Icon on the respective indicator form, located in the bottom right corner of the form. *New for 2011!*

3. Get KPIRS Update form executed from the Utility menu. *New for 2011!*

This section will refer to the last two.

Icon on the Indicator

Figure 10 - 1: The Key Performance Indicator Screen - Table View

Click on the [icon] icon to refresh the Operations Cost per FLE values directly from the Oracle server at Alberta Enterprise and Advanced Education. This process will <u>not</u> affect any of the data you have entered. Several indicators now have this icon [icon].

In the case of Revenue and Expenditure, the indicator has two icons. The right icon will refresh the values from the local FIRS system. The left icon will refresh values from the Oracle server at Alberta Enterprise and Advanced Education. This will allow you to compare the two versions.

Hint: *If there is a revenue or expenditure difference between the local FIRS and the Oracle server, it is probably because FIRS has not been submitted to Alberta Enterprise and Advanced Education.*
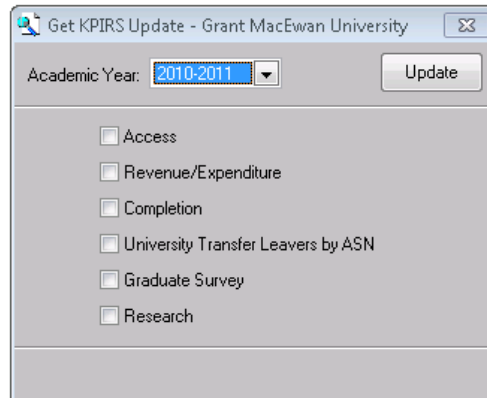
Get KPIRS Update Form

Figure 10 - 2: Get KPIRS Update Form

The Get KPIRS Update form will perform the same function as the buttons on the indicator. Select an **Academic Year** from the dropdown list. Select one or more of the possible areas to be updated. Press the **Update** button. Progress messages are displayed at the bottom of the form.

11. Reference Table Update
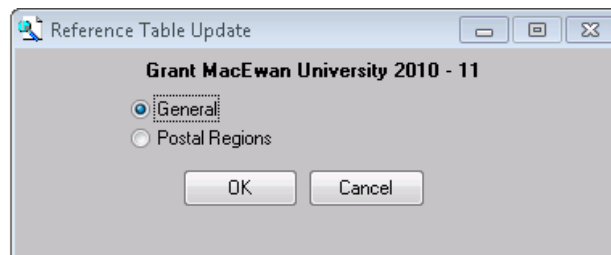
Figure 11 - 1: Reference Table Update Form

This form will update tables, with data from the Alberta Enterprise and Advanced Education Oracle database, that are common to all three of the Alberta Learning applications; LERS, FIRS, and KPIRS. This is the exact same form used in the LERS system to update common tables.

KPIRS would only require the **General** item to be selected. KPIRS does not use **Postal Regions**. Press the **OK** button to execute.

12. File Transfer Protocol (FTP) Browser
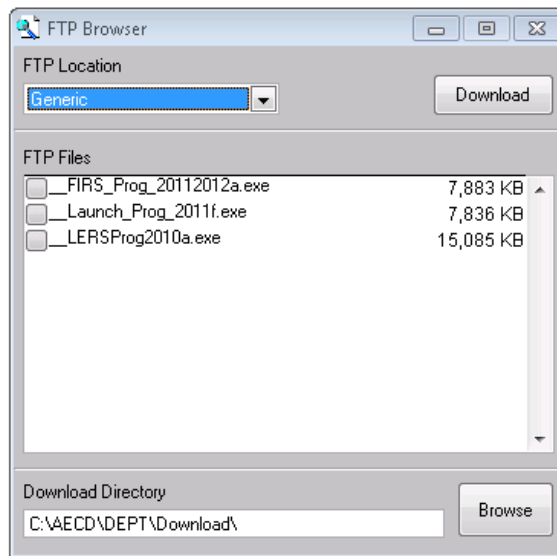
Figure 12 – 1 FTP Browser Screen

This form connects the application to the FTP server at Alberta Enterprise and Advanced Education. Once the KPIRS application has been installed on your computer, FTP downloads related to this application can be done from this form.

Three different options are available from the dropdown list; Generic, Data from Advanced Education, and Submission Folder. The Generic folder will contain the applications from Alberta Enterprise and Advanced Education; Launch, KPIRS, LERS, and FIRS. The 'Data from Advanced Education" folder will contain Data and Update installation files. KPIRS will alert you to the presence of new versions of the data and update files upon startup of the application. The Submission Folder will allow you to verify that you have made your submission to the FTP Server. File sizes that have 0 KB beside them usually mean that the file was created but is not valid.

Select a **Download Directory** by pressing the **Browse** button. Double click the file to be downloaded; it will turn red. Press the **Download** button.

To install the files, exit the application completely. Go to the **Download Directory** and proceed with the installation routine. Installation instructions can be found in Appendix A.

This form is the easiest way to download and install newer versions of the software, data or updates.

13. Provider Export

To open the provider export form, go to the menu bar and choose Utility and then click on Provider Export. The Provider Export screen will appear as shown below.
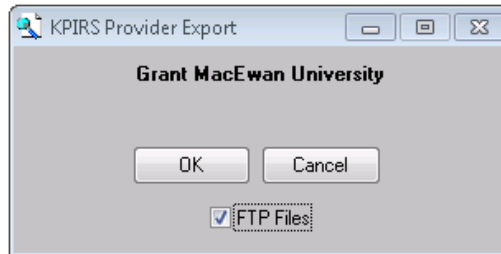

Figure 13 – 1 KPIRS Provider Export Screen

By pressing the **OK** button, information entered in KPIRS system for the current submission year will be exported to your local C drive and to the Department's FTP site if FTP Files check box is checked.

14. Provider Upload

To open the provider upload form, go to the menu bar and choose Utility and then click on Provider Upload. The Provider Import screen will appear as shown below.

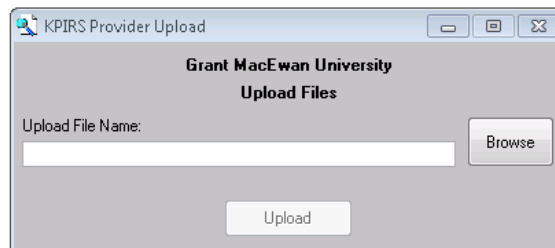**Figure 14 – 1 KPIRS Provider Upload Screen**

This form allows the user to upload any type of file to the FTP server. For example, ZIP files of the data directory can be sent for an analyst to review and identify and resolve issues. Pictures of error messages and supporting excel files to name a few.

Browse to the file for upload. Click on the **Upload** button to send to the FTP server.

15. Appendicies

Appendix A - Installation of the KPIRS Program

Overview

When installing the KPI system for the first time, ask your institution's IT department to contact Gordon de Rouyan at Gordon.deRouyan@gov.ab.ca regarding the user access rights the users of KPIRS need.

Installing the KPI system requires that you first go to the AL Generic Transfer Protocol (FTP) site and download the Launch and the KPIRS Program software files. The KPIRS data file is located on your institution specific FTP site.

The KPIRS application consists of three required files. The files are:

__Launch_Prog_9999X.exe   Where 9999 is a numeric value representing a year.
                                          Where X represents the version for that year.

__KPIRS_Prog_99989999X.exe   Where 99989999 is a numeric value representing an
                                          academic year.
                                          Where X represents the version for that year.

__KPIRS_Data_XX_99999999999999.exe   Where XX represents the code specific to that institution.
                                          Where 99999999999999 represent the date and time the
                                          data file was created.

Downloading from the Alta Enterprise & Advanced Education FTP Server

There are three ways to download the software:

1. Internet Explorer, Safari, Google Chrome, …

2. FTP Browser within KPIRS

3. FTP Explorer

Note: *It will be important to know the drive and directory where the downloaded files have been saved to. FTP Browser within KPIRS shows the directory at the bottom of the form.*

If this is a first time download of the Alberta Enterprise and Advanced Education software (i.e. if you do not have the Launch Program, the KPIRS or FIRS or LERS Program, and KPIRS Data installed on your computer or servers) use either an Internet Browser or FTP Explorer to download the files. Contact   for user ids and passwords to access the Generic and Institution specific location on the Alberta Enterprise and Advanced Education FTP server.

Internet Explorer, Safari, Google Chrome, …

These internet browsers allow a user to access an FTP Server by using a specific URL command. All browsers use the same command though might be slightly different from browser to browser. The following is a template for what one would look like:

Safari and Google Chrome   ftp://userid:password@199.213.72.3
Internet Explorer   ftp://userid:password@199.213.72.3/userid

Both of these commands will direct the browser to the same location on the FTP server. Clicking on a link within the browser will either select a file to download or enter into a sub-directory displaying more results. If the browser asks to **Save** or **Download** the file, always click on **Download**.

Once the file has been downloaded, it will be up to the user to find where the file has been downloaded. Google Chrome shows the file at the bottom of the page which can be clicked on to begin the install. Safari leaves a window showing a list of downloaded files open. Internet Explorer will prompt the user for the location where the file is to be saved.

As you can see each browser is different and would require different instructions for each. Contact Gordon de Rouyan at Gordon.deRouyan@gov.ab.ca if you would like to be guided through this process.

FTP Browser in KPIRS

The process of downloading is described in detail in the section **File Transfer Protocol (FTP) Browser.** If using the FTP Browser in KPIRS, it would be obvious that LERS, FIRS, or KPIRS had already been installed.

The FTP Browser within FIRS could be used to download the KPIRS application. But only the FTP Browser within KPIRS can get access to the KPIRS Data file.

This is the easiest way to download files from the Alberta Enterprise and Advanced Education FTP Server.

FTP Explorer

Steps 1 to 4 below explain how you can *download* the KPIRS Program and the Launch program from the AL Generic FTP site using FTP Explorer.

To download the KPIRS Program and Launch Program:

1. Open FTP Explorer by double clicking on the **FTP Explorer** icon on your desktop or click on the **Start** button on the windows task bar, move the mouse up to **Programs**. From the Programs *submenu* click on **FTP Explorer**. If you do not have FTP Explorer installed you need to install FTP Explorer and request user ids and passwords from Alberta Enterprise and Advanced Education.

2. Select the **AL Generic** on the Connect screen. Click on the **Connect** button. At this time you are in the AL Generic site.

3. Click on the **firs9gen** folder. On the right hand side of the screen you will see a file named __KPIRS_Prog_20102011a.exe and __Launch_Prog_2011f.exe; or similar. Press the **Ctrl** key on the keyboard and click on the file names one by one. Now the two files should be selected.

4. Go to the menu bar and click on **File**. From the drop down list click on **Download To…**

   The Download to dialog box appears. Locate the folder where you want to save the files and click on the **Save** button. It will ask you to save again for the second file. Click on **Save**. If you do not have an existing folder where you can *download* the files create a new folder and click on the **Save** button twice for each file.

   This process might take a few seconds. Once the files are downloaded successfully you will see a transfer complete message for each file you downloaded at the bottom of the FTP Explorer window.

To download KPIRS Data Install:

1. To open FTP Explorer double click on the **FTP Explorer** icon on your desktop or click on the **Start** button on the Windows task bar, move the mouse up to **Programs**. From the Programs *submenu* click on **FTP Explorer**.

2. Click on your institution name on the Connect screen and then click on the **Connect** button. At this time you are at your institution site.

3. Locate the folder where the KPIRS Data files are located. On the right hand side, you will see a file named KPIRS_data_GP_99999999999999.exe; or similar. The file is institution specific with different numeric information at the end each time. Press the **Ctrl** key on the keyboard and click on the **file name**. Now the file should be selected.

4. Go to the menu bar and click on **File**. From the drop down list click on **Download To…** and the Download to dialog box appears. Locate the folder where the files are to be saved to and click on the **Save Button**.

   This process might take a few seconds. Once the file is downloaded successfully, a transfer complete message will display at the bottom of your institution FTP Explorer window.

   At this time, you are ready to install the three files that you downloaded.

Note: *Make sure to install the KPIRS data file first before you install any KPIRS update file.*

Note: *As of KPIRS 2010-2011a, KPIRS Updates should no longer be necessary. Please see the* **What's New for 2011** *section.*

Executing the Installation Files

If this is not the first time to install, check the properties of the "Alberta Learning" icon on your desk top as to where to install. For example, if it was initially installed on the "J" drive, then install it there.

e.g.   j:\aecd\dept\bin\launch.exe → install to j:\aecd\dept

The screen shot below shows the "Start in:" directory as "J:\AECD\DEPT\BIN". The installation directory for your specific computer will be "J:\AECD\DEPT" for <u>ALL</u> of the installs.

Warning: *Do not install to the bin or dat folders. The install routines will add these directory names after the installation directory you enter.*
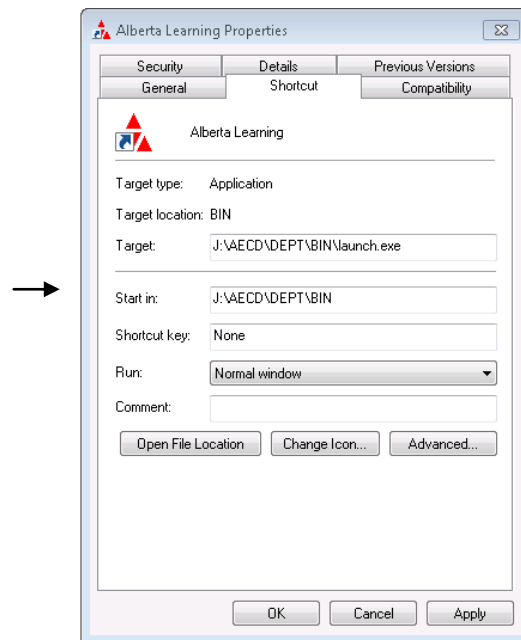
Figure A - 1: Alberta Learning Icon Properties

The Install Process:

The following steps should be performed for each of the files that were downloaded. The order of the installs is not important.

1. Open **Windows Explorer** and locate the folder where you saved the files from the FTP server. For example C:\temp

2. Double click on the file to be installed. A **Welcome** screen will appear. You can follow the on screen instruction or follow step 3 to 6 below.

3. Click **Next** twice.

4. Identify where the program was previously installed on your network. Select the drive and install the program. (See the top of the section *Executing the Installation Files*.) The directory may already be displayed correctly.
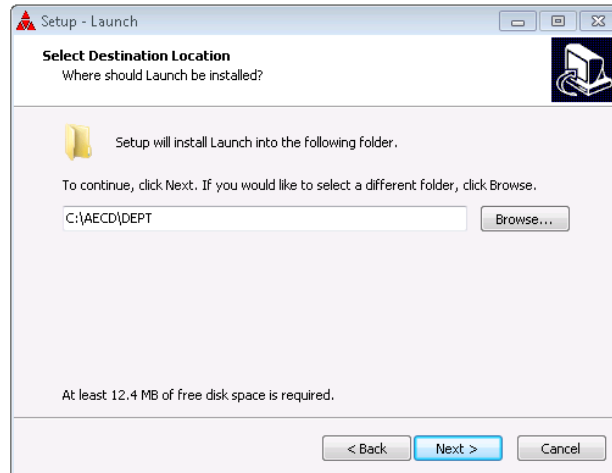
Figure A - 2: Installation Directory

5. Click on **Next** twice and click on **Install** to begin the installation process.

6. Click on **Finish** to exit the installation wizard.

7. Repeat the process for any additional files.

When the entire install process is complete, the following paths will be found on your **X**: drive, where **X** refers to the drive you selected during the install.

    X:\AECD\DEPT\BIN where the program files reside

    X:\AECD\DEPT\DAT where the data files reside

Inside the **BIN** you will find the launch.ico file and inside the **DAT** folder you will find the database files.

Windows NT:

If you are running Windows NT you will have to go to the folder containing the Launch.exe (launch.exe) program and create the shortcut yourself.

To create the shortcut on your desktop:

1. Locate the **BIN** folder and double click on it.

2. Right click on the **launch**.**exe** file and click on **Send To**

3. From the *submenu* click on **Desktop (Create Shortcut)**

4. If you prefer, rename the new shortcut icon that you just created, and delete any old Alberta Enterprise and Advanced Education icons.

You should now have an updated red four triangular icon on your desktop entitled Alberta Learning.

New Computers

There are times when users get new computers but the Alberta Enterprise and Advanced Education software has already been installed correctly on the server. This section will handle this issue.

In prior years, Alberta Enterprise and Advanced Education has supplied a file called __VFP9_DLL_Install.exe on the FTP server. Supplying this file to the institutions is done differently now. The __VFP9_DLL_Install.exe file is included with all of the _Prog_ install files. The __VFP9_DLL_Install.exe file will automatically be saved to the **X:\AECD\DEPT** where **X** refers to the drive you selected during the original install.

Maybe this is a new user to the Alberta Enterprise and Advanced Education software. In this case, it would be necessary to ensure the user has full server access rights to the **X:\AECD** directory. Once the user has access to the folder, the user or IT staff can execute the **X:\AECD\DEPT**__VFP9_DLL_Install.exe. Follow the instructions in the *Executing the Installation Files* section.

Appendix B - Setting up FTP Explorer

Once you have completed installing FTP Explorer on your computer, an icon should appear on your computer desktop.

1. Double click on the FTP Explorer icon. An FTP Explorer Window appears as shown below.
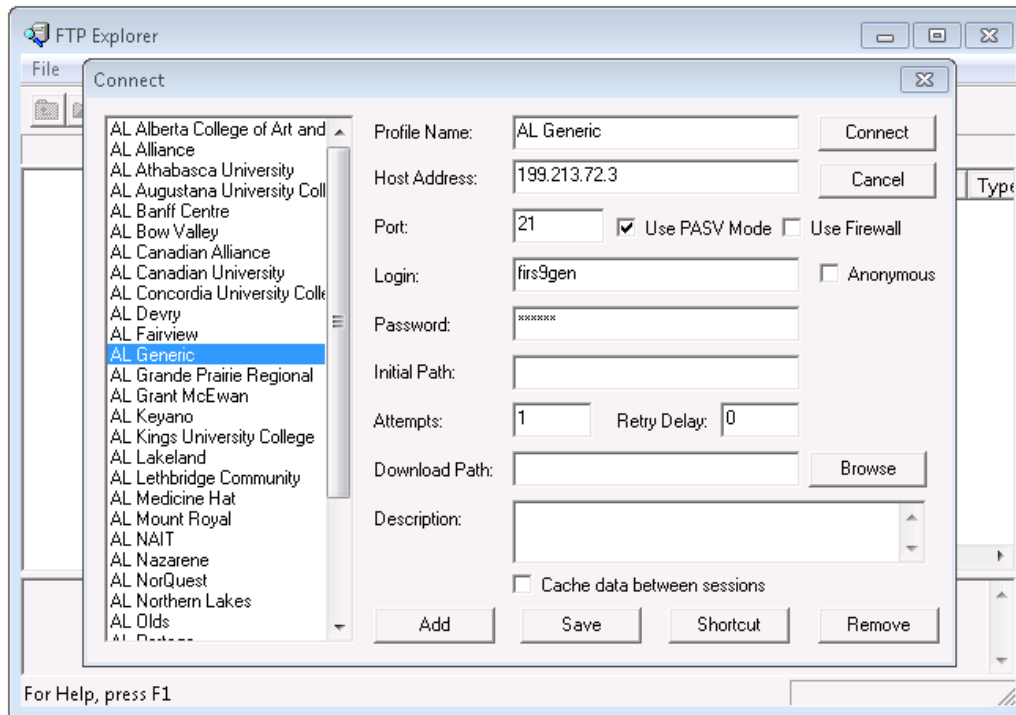
Figure B - 1: The FTP Explorer Screen

2. Before you can transfer files to and from the FTP site, you need to fill in the **Profile Name**, the **Host Address**, the **Login** and the **Password** assigned to your institution. The password is available by contacting Gordon de Rouyan at Gordon.deRouyan@gov.ab.ca. Also create a profile for AL Generic.

3. Click on the **AL Generic** and click on the **Connect** button. The AL Generic - FTP Explorer window appears. At this point the AL Generic Setup is complete.

Note: *In the display screens above, the AL Generic site refers to the one location used by all institutions to access the Alberta Enterprise and Advanced Education executable programs.*

Appendix C - KPIRS Toolbar Items

The following icons are accessible when a KPI reports screen, a Key Performance Indicators screen or a Non-Credit Entry screen are open. You can either use the icons or the drop down menus from the menu bar.

Icon	Item	Description
	Preview	Allows you to preview a report before printing. It displays the report, as it will appear when printed.
	Print	Prints a screen capture for the active window.
	Go to Page	Goes to the page specified on the print preview screen. This icon is available only when you are viewing a report from a screen.
	Exit	Closes the current screen.
	Save	Saves any outstanding changes to the KPIRS database. Use this icon after new records are added, changed or deleted from the database. This function is also available from the **Edit** – **Save** drop down menu.
	New	Puts the screen in an Enter mode, which means that the new record can be entered. This function is also available from the **Navigation** – **New** drop down menu.
	Delete	Removes the current record from the KPIRS database. This function is also available from the **Navigation** – **Delete** drop down menu.
	Edit	Updates the records found from the query result.

The next four 'arrow' icons allow you to navigate from one record to the next or from the first record to the last record. The icons or the menu items are available after the Key Performance Indicators or the Non-Credit Entry screen is displayed on the screen.

Icon	Item	Description
	First	Moves to the first record. This function is also available from the Navigation - First drop down menu.
	Previous	Moves to the previous record. This function is also available from the Navigation – Prior drop down menu.
	Next	Moves to the next record. This function is also available from the Navigation – Next drop down menu.
	Last	Moves to the last record. This function is also available from the Navigation – Last drop down menu.

Tool Tips: *Text 'tool tips' have been provided on the tool bars. When the mouse pointer is placed over a tool bar icon, a small text box will appear describing the function that icon will perform.*
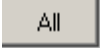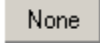
Appendix D - What's New for 2011

A. Additions and Updates – 2011

The following updates were made to the manual;
1. Updated all form pictures for newer Windows 7 look.
2. Updated with new version numbers of the software.
3. Added two new elements to the Utility menu in section 1
4. Added Get KPIRS Update section.
5. Added Refresh Code Tables section.
6. Re-Wrote the installation process appendix.

B. KPI Reports Screen Button Items.

The KPI Screen Button Items have been taken out from the main Manual. This functionality has been replaced with a "right-click" on a list. A popup window appears with "Select All", "Select None", "Invert Selection", and "Exit". This was done to simplify the objects design.

Icon	Item	Description
All	All	Clicking on the All button selects all the indicators report in one step. This button is used if viewing or printing of all the indicators reports if necessary.
None	None	Deselects all the selected indicator reports in a single step.
Invert	Invert	Selects and deselects all the indicator reports in one step. This button can be clicked more than once to reverse the buttons selected.
Export...	Export	Exports the selected indicators report into a different file format such as Excel or database files.

Appendix E - Glossary of Terms

Cursor	A blinking line character that signifies where the next character will be displayed on the screen.
Check Box	A box that you can click to turn an option on or off. When the option is on, a check mark appears in the box.
Disabled	The control (text box, check box or button) cannot be used to perform a function. If the control is disabled it is grayed out.
Download	The process of copying a file from a file server to your local computer or onto a network
Insertion Point	A blinking line character that signifies where the next character will be displayed on the screen.
Export	To format data in such a way that it can be used by another application.
Enabled	The control (text box, check box or button) can be used to perform a function. If the control is enabled it is not grayed out.
Fields	A space allocated to enter a particular item of information.
File Name	The name of a file.
FTP	Stands for File Transfer Protocol that is used to transfer files between your local PC and a remote FTP server. You can connect to any FTP server, browse through directories and files, and transfer files (*upload* or download) in either direction.
Import	Refers to the ability of an application to read and use data produced by a different application.
Option Buttons	Buttons used for selecting options in interactive forms; only one can be chosen at a time. If an option button is selected by clicking on it, all the other buttons are automatically deselected.
Path	A list of directories.
Submenu	A cascaded menu that appears after selecting a command on the main menu. An arrowhead after a command indicates that a submenu will be displayed with additional menu options.
Upload	To transmit data from your PC to a network.

List of Figures